

# Create and manage users

## PUQcloud Panel

[Order Now](#) | [Download](#) | [FAQ](#)

This guide explains how administrators can create users, view their client associations, edit details, and remove users in **PUQcloud Panel**.

---

### Overview

- **Path:** Menu → Clients → Manage Users
- **You can:**
  - Create a new **User** (login identity).
  - View a user's **associated clients** and statuses.
  - **Edit** contact info, language, verification flags, and 2FA.
  - **Delete** a user account.
- **Who:** Staff with permission to manage users.

**Tip:** A **User** is a person's login. A **Client** is an account/business they belong to. One user can be associated with multiple clients (e.g., consultant, owner). Permissions are managed from the **Client → Users** tab.

---

### List View (Manage Users)

In the table you'll see: avatar, name, status badges (e.g., **ACTIVE**, **INACTIVE**, **NEW**), **2FA** indicator, contact details (email, phone), **Clients** counter with an **eye** button, **Created** date, and row actions (**Edit**, **Delete**). Use **Search** to filter.

(Screenshot: View/Search Users list view)

The screenshot shows the 'View/Search Users' page in the PUQcloud interface. The page features a sidebar menu on the left with categories like MENU, SETTINGS, and CUSTOMIZATION. The main content area displays a table of users with columns for Name, 2FA, Contacts, Clients, and Created. A '+ Create' button is visible in the top right corner.

Name	2FA	Contacts	Clients	Created
Phoebe Stamm <small>INACTIVE</small>	<input type="checkbox"/>	phoebe6@live.com +19293601329	1	2025-06-25 23:50:35
Ransom Wuckert <small>INACTIVE</small>	<input type="checkbox"/>	ransom.wuckert@msn.com +18595679066	1	2025-06-25 23:50:34
Ruslan Polovyi <small>NEW</small>	<input type="checkbox"/>	yullia.noha@gmail.com +1799-771-700	1	2025-06-24 07:12:17
Anissa Rosenbaum <small>NEW</small>	<input type="checkbox"/>	anissa.rosenbaum@hotmail.com +17738882555	1	2025-06-25 23:50:44
Ruslan Polovyi <small>ACTIVE</small>	<input type="checkbox"/>	puqcloud@gmail.com +11234567890	1	2025-06-28 15:33:28
Isac Mann <small>ACTIVE</small>	<input type="checkbox"/>	i.mann@icloud.com +11-404-256-9949	1	2025-06-25 23:50:45
Deshawn Franecki <small>NEW</small>	<input type="checkbox"/>	deshawn_franecki@gmx.com +11-351-286-4096	1	2025-06-25 23:50:43
Claude Eichmann <small>NEW</small>	<input type="checkbox"/>	claude703@protonmail.com +1.864.780.9104	1	2025-06-25 23:50:36
Hubert Wiegand <small>ACTIVE</small>	<input type="checkbox"/>	hubertwiegand@outlook.com +1.361.379.5527	1	2025-06-25 23:50:37

## Create a User

- Go to **Clients** → **Manage Users** and click **+ Create**.  
(Screenshot: Create User modal)

The screenshot shows the 'Create' modal form overlaid on the user management page. The form contains the following fields and options:

- Email**: Text input field.
- Password**: Text input field.
- 2FA**: Toggle switch, currently set to 'Off'.
- Firstname**: Text input field.
- Lastname**: Text input field.
- Phone Number**: Text input field with a country code dropdown (currently '+1').
- Language**: Dropdown menu with the option 'Select an option'.
- Admin Notes**: Text area for internal notes.

Buttons for 'Close' and 'Save' are located at the bottom right of the modal.

- Fill the fields:
  - Email** (required)
  - Password** (required)
  - 2FA** (toggle; optional but recommended)
  - Firstname, Lastname**
  - Phone Number** (with country code)
  - Language** (UI language for the user)
  - Admin Notes** (internal only)
- Click **Save**. The user appears in the list.

**Next step:** Associate this user with a client from **Clients → Manage Clients → open a client → Users tab → + Associate User** (choose permissions there).

## View a User's Clients

1. In **Manage Users**, find the user.
2. Click the **eye** icon in the **Clients** column.
3. In **User Clients** modal, review:
  - **User Information:** UUID, Name, Email, Phone.
  - **Associated Clients:** Client Name, Company Name, Tax ID, and **Status** badges (e.g., **ACTIVE**, **OWNER**).
4. Close when done.

(Screenshot: User Clients modal)

The screenshot shows a 'User Clients' modal window. The modal is divided into two sections: 'User Information' and 'Associated Clients'. The 'User Information' section displays the following details:

- UUID: 8643a8a7-9d16-462d-80ba-ec5c4a25def3
- Name: Ruslan Polovyi
- Email: puqcloud@gmail.com
- Phone Number: +11234567890

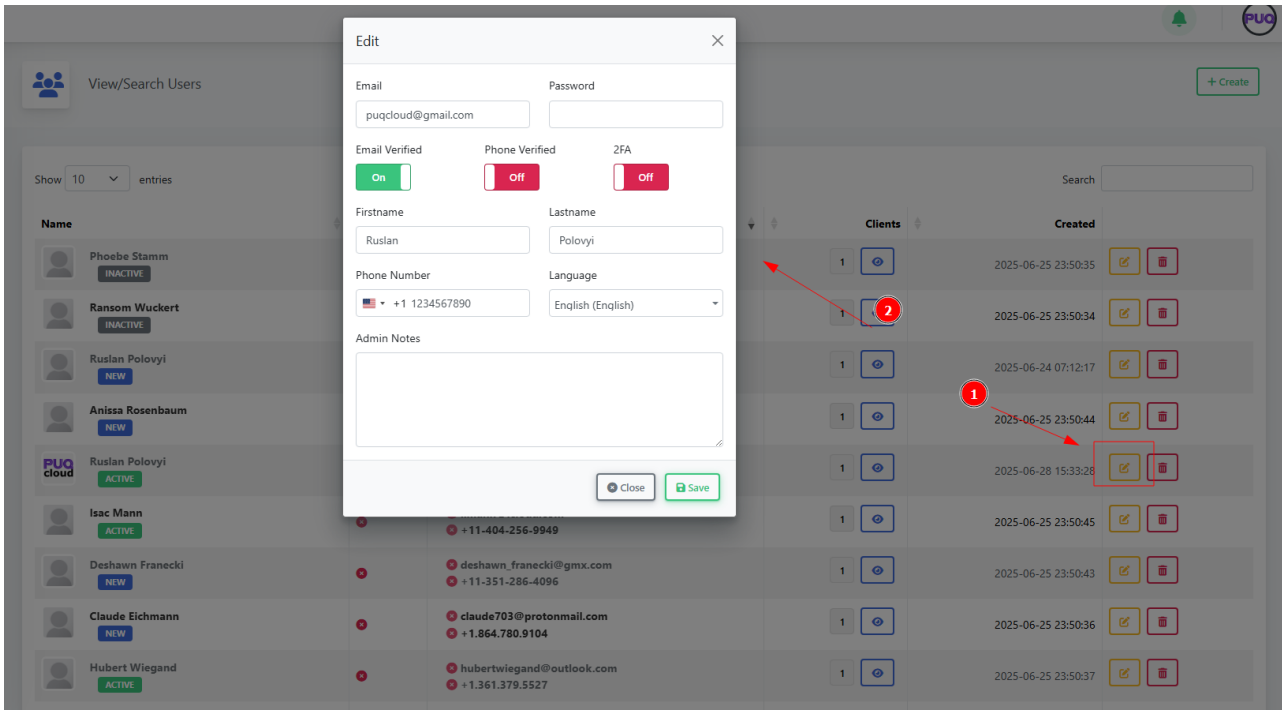
The 'Associated Clients' section contains a table with the following columns: CLIENT NAME, COMPANY NAME, TAX ID, and STATUS. The table lists one client:

CLIENT NAME	COMPANY NAME	TAX ID	STATUS
Ruslan Polovyi	My company name	12345678	ACTIVE OWNER

Below the modal, a list of users is visible. A red box highlights the eye icon in the 'Clients' column for the user 'Ruslan Polovyi', and a red arrow points from this icon to the 'User Clients' modal.

## Edit a User

1. In **Manage Users**, click the **Edit** (pencil) icon on the desired row.  
(Screenshot: Edit User modal)



## 2. Update fields:

- **Email, Password** (to reset), **Firstname, Lastname**
- **Phone Number, Language, Admin Notes**
- Verification toggles: **Email Verified, Phone Verified**
- Security toggle: **2FA** (enable/disable)

## 3. Click **Save**.

## Delete a User

1. In **Manage Users**, click the **Delete** (trash) icon.
2. Confirm the action.

## Field Reference

Field	Where	Description
Email	Create/Edit	User's login email. Must be unique.
Password	Create/Edit	Set/reset the user's password.
2FA	Create/Edit	Turn on two-factor authentication for extra security.
Firstname / Lastname	Create/Edit	User's display name.
Phone Number	Create/Edit	Stored with international country code.
Language	Create/Edit	UI language for this user.
Admin Notes	Create/Edit	Internal notes visible to admins only.

Field	Where	Description
Email Verified	Edit	Mark whether the email has been verified.
Phone Verified	Edit	Mark whether the phone has been verified.

---

## Good Practices

- Require **strong passwords** and **2FA** for staff.
  - Keep **contact info** and **language** up to date.
  - Use **Admin Notes** to capture context (e.g., who requested access, ticket link).
  - Manage access at **Client** → **Users** (set granular permissions per client).
- 

## Troubleshooting

- **Cannot log in** → Reset **Password**; ensure **Email Verified** is On; check if the user is **ACTIVE**.
  - **User can't see a client** → Associate them in **Client** → **Users**, verify **status** and **permissions**.
  - **2FA lockout** → Temporarily disable **2FA** in **Edit**, then re-enroll.
  - **Duplicate email** → Each user must have a unique email; rename or remove old account.
- 

Revision #7

Created 31 July 2025 05:38:27 by Yuliia Noha

Updated 28 October 2025 09:28:48 by Yuliia Noha